

Edit a category

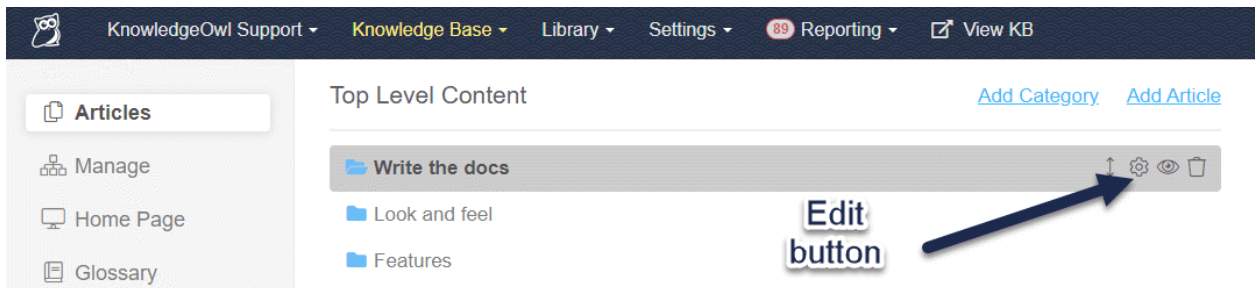
Last Modified on 12/05/2024 12:59 pm EST

Open a category for editing, organize your content, and add internal notes.

Edit a category

To edit an existing category:

1. Go to **Knowledge Base > Articles**.
2. Hover over the category you want to edit.
3. Select the Gear icon / **Edit**.



4. KnowledgeOwl opens the category editor.

Internal note

Sometimes, you need a place to leave notes for other authors (or yourself) that isn't the [Version Notes](#) field. This might include notes on who the subject matter expert is, or that if you update this article, you should also update another article, or some type of quality control note (such as Article Confidence levels if you use KCS).

This type of note is exactly what we designed the **Internal Note** field for.

Internal notes:

- Are notes you want front-and-center when you or other content creators are editing a given article or category.
- Are displayed only in [app.knowledgeowl.com](#), not to your readers.
- Accept very simple HTML markup, so you can include hyperlinks and lists.
- Will be displayed at the top of ALL versions of the article.
- Are available in the [Manage Articles CSV export](#).

- If used in a template article, will be copied to new articles created from that template.
- If in an existing article, will be copied when a new article is created from that existing article.

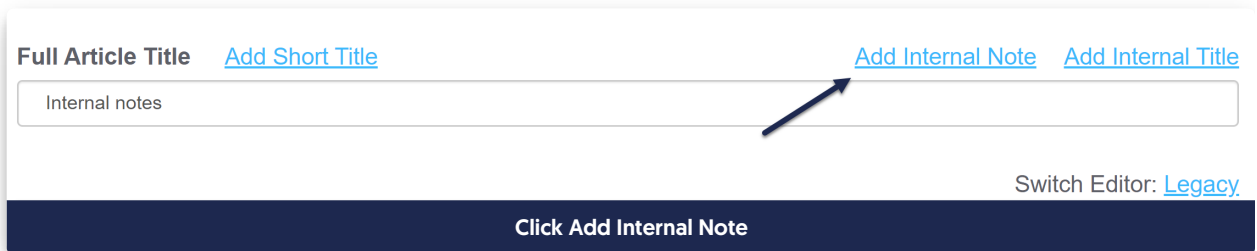
Add an internal note

Authors with the default Editor or Writer role can add internal notes. If you're using a [custom role](#), you'll need to have the [Internal Notes Permission](#) to Create new internal notes.

Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

To add an internal note:

1. Select the **Add Internal Note** link to the right of the title:



The screenshot shows the article editor interface. At the top, there are links for 'Full Article Title', 'Add Short Title', 'Add Internal Note', and 'Add Internal Title'. Below these links is a text input field containing the text 'Internal notes'. An arrow points from the 'Add Internal Note' link to the input field. At the bottom right of the input field, there is a link 'Switch Editor: Legacy'. Below the input field is a dark blue button with the text 'Click Add Internal Note'.

2. Add the HTML you want to use for your note. If you're just putting in regular sentences, you don't need to add HTML, but you can use it for formatting lists, hyperlinks, and so on.
3. Select the style you want to use for your note from the dropdown; we default to Alert Info. Here, we've added a one-line note and selected the Alert Warning style.

Create Internal Note
✕

Note HTML:

Here's a test note

Style

Alert Warning
▾

[Cancel](#)
Create Note

Sample Create Internal Note pop-up. Click Create Note to add it.

4. Select **Create Note**.

5. This creates the note and displays it using the style you selected between the title and the editor. You do not need to resave the article itself for the note to be saved.

Full Article Title
[Add Short Title](#)
[Add Internal Title](#)

Internal notes

[Edit Note](#)
[Remove Note](#)

Here's a test note

Sample Internal Note from the configuration used above

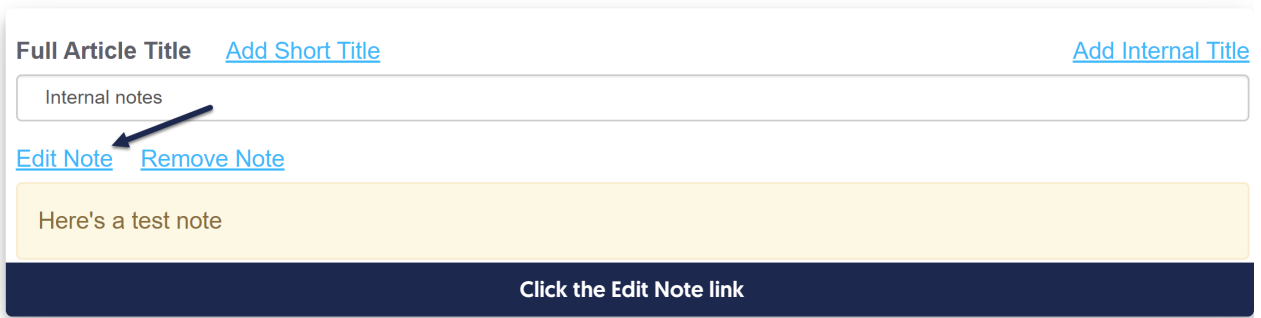
Edit an internal note

Authors with the default Editor or Writer role can edit internal notes. If you're using a **custom role**, you'll need to have the **Internal Notes Permission** to Edit internal notes.

Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

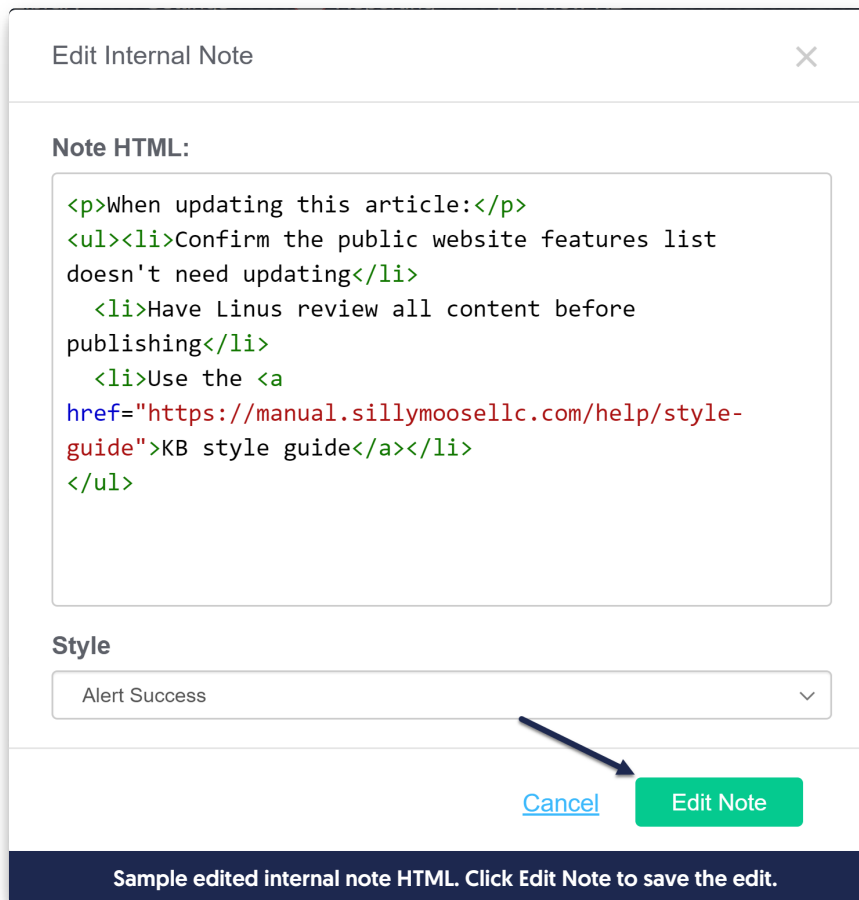
Once an internal note exists, you can edit it to make updates. To do so:

1. Select the **Edit Note** link that appears just above the note:



The screenshot shows a user interface for managing internal notes. At the top, there are three links: "Full Article Title", "Add Short Title", and "Add Internal Title". Below these is a text input field labeled "Internal notes" containing the text "Here's a test note". An arrow points to the "Edit Note" link located just above the note. Below the note is a dark blue bar with the text "Click the Edit Note link".

2. Edit the HTML or change the style as you'd like. Once you're done making changes, select **Edit Note** to save your changes. Here, we've added a more complex note with a list:



The screenshot shows a dialog box titled "Edit Internal Note" with a close button (X) in the top right corner. The dialog is divided into two main sections: "Note HTML:" and "Style".

The "Note HTML:" section contains a text area with the following HTML code:

```
<p>When updating this article:</p>
<ul><li>Confirm the public website features list
doesn't need updating</li>
  <li>Have Linus review all content before
publishing</li>
  <li>Use the <a
href="https://manual.sillymoosellc.com/help/style-
guide">KB style guide</a></li>
</ul>
```

The "Style" section features a dropdown menu currently set to "Alert Success". An arrow points from the dropdown menu to the "Edit Note" button.

At the bottom of the dialog, there are two buttons: "Cancel" and "Edit Note". Below the buttons is a dark blue bar with the text "Sample edited internal note HTML. Click Edit Note to save the edit."

3. The note updates immediately based on the changes you made. You do not need to resave the article or category itself for the note to be saved.

Full Article Title [Add Short Title](#) [Add Internal Title](#)

Internal notes

[Edit Note](#) [Remove Note](#)

When updating this article:

- Confirm the public website features list doesn't need updating
- Have Linus review all content before publishing
- Use the [KB style guide](#)

Switch Editor: [Legacy](#)

Sample Internal Note displayed based on the HTML in the previous step

Remove an internal note

Authors with the default Editor or Writer role can remove internal notes. If you're using a **custom role**, you'll need to have the **Internal Notes Permission** to Remove internal notes.

Authors who don't have permissions to create, edit, or delete internal notes will still be able to see internal notes created by other authors who do.

To delete an internal note completely:

1. Select the **Remove Note** link that appears just above the note:

Full Article Title [Add Short Title](#) [Add Internal Title](#)

Internal notes

[Edit Note](#) [Remove Note](#)

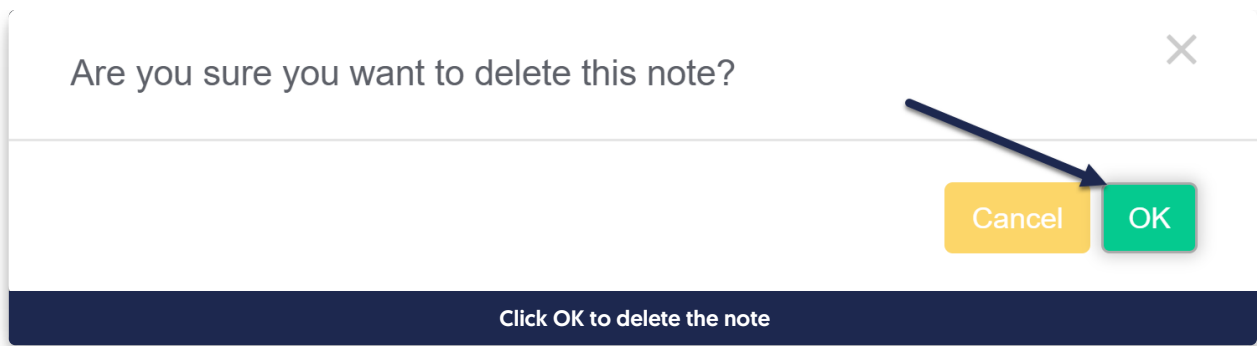
When updating this article:

- Confirm the public website features list doesn't need updating
- Have Linus review all content before publishing
- Use the [KB style guide](#)

Switch Editor: [Legacy](#)

Click the Remove Note link

2. A confirmation window will pop-up to be sure you want to delete the note. Select **OK** to delete the note.



3. The note is deleted immediately; you do not need to resave the article or category for the deletion to complete.

What HTML is supported in internal notes?

We've kept these notes pretty lean. They will support HTML:

- Paragraph `<p>`
- Numbered list ``
- Bulleted list ``
- List items ``
- Hyperlinks `Link text`
- Bold text `` or ``
- Italics `<i>`
- Paragraph breaks `
`
- Headers, e.g. `<h1>`

Internal category title

For each category, you can add an internal title. Internal titles are used only within app.knowledgeowl.com - your readers do not see them when viewing the knowledge base.

Internal titles can be useful when you have a lot of categories or subcategories with very similar names, and you want to be sure you're selecting the correct category when you use:

- The [Insert Link to Article](#) option in Modern Editor
- The [Related Articles](#) section
- The Change Article Category option in the article editor

To add an internal title to a category:

1. Open the category settings. Refer to [Edit a category](#) for more information.
2. Select **Add Internal Title**.



3. The **Internal Category Title** field displays. Enter the title you want to use internally here.

Enter the Internal Category Title.

4. Be sure to Save your changes.

Where will I see internal category titles?

The internal title is displayed instead of the Full Article Title in these places within app.knowledgeowl.com:

- The Articles hierarchy
- In the editor, the Category display beneath the Author field, along with the pop-up search to change categories when that gear icon is clicked
- The [Manage Articles CSV export](#) > Basic > Category and Breadcrumbs columns
- The [Insert Link to Article](#) pop-up/search in the editor
- The [Related Articles](#) search in the editor (only Topic Display and Custom Content categories show up in this list)
- If you have synced categories between different knowledge bases, the internal title will display in the editor messages identifying the synced categories.

Use cases

My knowledge base might contain one category for each of my products, and I might use the same subcategory hierarchy for each product. So this might be my first two products:

- Opportunities for Owls
 - Setup instructions
 - Troubleshooting & tips
 - Customization
- Fight & Flight
 - Setup instructions
 - Troubleshooting & tips
 - Customization

When I want to reference the Fight & Flight Customization subcategory to assign an article to it, or Link to Article to that subcategory, right now if I search Customization, both of these will come up and I won't be able to tell which is for Opportunities for Owls and which is for Fight & Flight. I don't want to change the titles of the categories themselves, because I don't want my customers to see that difference.

I can add an Internal Title to both categories to distinguish them, and that's what will be used for all app.knowledgeowl.com layouts:

- Opportunities for Owls
 - Setup instructions - OfO
 - Troubleshooting & tips - OfO
 - Customization - OfO
- Fight & Flight
 - Setup instructions - F&F
 - Troubleshooting & tips - F&F
 - Customization - F&F

This way, when I link to a category or I edit the category, I can search for Customization - F&F and know I'm always getting the correct category.

Category icons

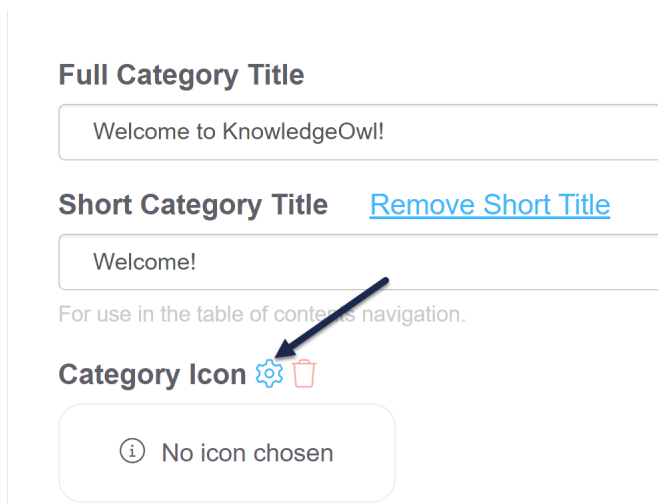
You can add icons to your categories, then use these icons on your homepage or when displaying lists of categories.

You can choose to add an icon in two ways:

- Use our integration with Font Awesome to select a Font Awesome icon, set the color, and style for it. (Duotone is pretty cool!)
- Upload your own icon file (or use an existing icon in your File Library)

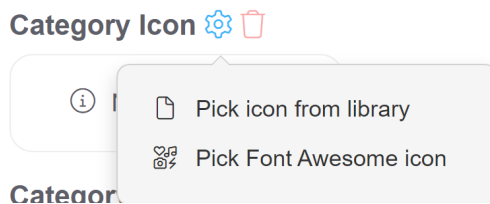
Add an icon to a category

1. Open the category for editing.
2. Click the gear cog next to the **Category Icon** heading.



The screenshot shows a category editing form with three main sections: 'Full Category Title' with a text input containing 'Welcome to KnowledgeOwl!'; 'Short Category Title' with a text input containing 'Welcome!' and a blue link 'Remove Short Title'; and 'Category Icon' with a gear icon and a trash icon. Below the 'Category Icon' heading is a rounded button with an information icon and the text 'No icon chosen'. A blue arrow points from the gear icon to the 'Category Icon' heading.

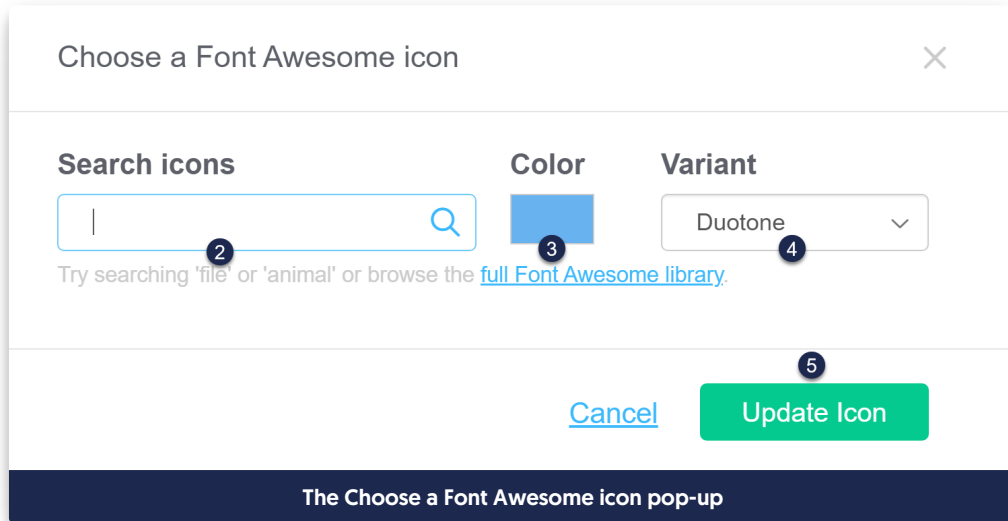
3. Choose how you'd like to add an icon:



The screenshot shows the 'Category Icon' heading with a gear icon and a trash icon. Below it is a dropdown menu with two options: 'Pick icon from library' with a folder icon and 'Pick Font Awesome icon' with a gear icon.

- **Pick icon from library** will prompt you to select an existing file from your File Library or upload a new file of your choice.
 1. Once you select this option, an **Add from Library** pop-up opens.
 2. Search or browse for an existing file or use the **Upload New File** button in the lower left to add a new one.

3. Once you've selected or uploaded the file you'd like to use, click **Insert File** to add the icon to the category.
- **Pick Font Awesome icon** will prompt you to select one of over 6000 icons in Font Awesome's icon library. We pay for the license so you can use them as much as you'd like!
 1. Once you select this option, a **Choose A Font Awesome icon** pop-up opens:



2. Enter a phrase or word into the **Search icons** box, then hit Enter or click the magnifying glass to search. This search will look through Font Awesome's catalog to return icons. If you're not sure what to search, you can also head over to the [Font Awesome website](#) to browse icons. Click to select the icon you'd like to use.
3. The **Color** section will start with whatever color has been set in **Settings > Style > Colors > Category Icons**. To change the color of the icon, click in the **Color** swatch. You can use the color picker to select a new color or directly enter a hex code.
4. The **Background** section will start with whatever color has been set in **Settings > Style > Colors > Category Icons Background**. To change the color of the background, click the **Background** swatch. You can use the color picker to select a new color or directly enter a hex code. The background will provide a small square background of color around the icon:



5. Select a **Variant**. These are Font Awesome's predefined variant styles:
 - **Duotone (default):** A two-tone style, Duotone will use the color of your choice plus a lighter variation to provide a two-tone icon. Font Awesome suggests this style for an illustrated feel and attention-grabbing, which is why we default to this style for category icons. For example, here is the House icon in Duotone:



- **Regular:** The icon is outlined using the color you selected. Font Awesome suggests this style for easy, readable icons that blend in with regular text. Here's the same House icon in Regular:



- **Solid:** This icon usually follows the Duotone version of the icon but fills it solid with the color of your choice. Font Awesome recommends these for small sizes and bringing contrast to text. Here's the same House icon in Solid:



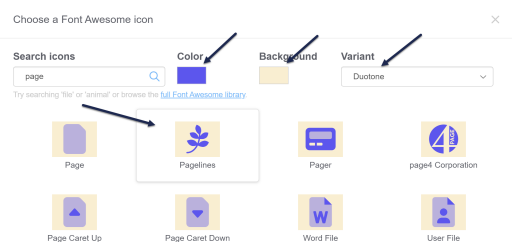
- **Light:** Light uses the same outlined icon version as Regular, but thins the lines moderately. Here's the same House in Light:



- **Thin:** Thin uses the same outlined icon version as Regular, but thins it significantly. Here's the same House in Thin:



6. Once you've configured the icon as you'd like, click the **Update Icon** button to add the icon to the category. For example, here we've selected the **Pagelines** icon in a purple Duotone with a cream background:



4. Once you've added your icon, a preview of your selection appears in the editor.

5. Be sure to **Save** the changes to your category once you're done.

Display category icons on your homepage only

We have a pre-defined merge code to help you display your icons on your homepage. This merge code will change some of the look and feel of your homepage, so if your knowledge base is in active use, we recommend requesting a **Sandbox** copy of it to test the merge code in.

See [Add category icons to your homepage category panels](#) for full steps on adding category icons to your homepage automatically!



Display category icons in other categories

If you have a category which contains subcategories, you can use the Icon panels [Subcategory Display Type](#) to display those icons.

Control subcategory display

For Default category types, you can choose how to display subcategories (that is, categories within this category) on the category homepage using the [Subcategory Display Type](#) setting.

Subcategory Display Type

- Title and description
- Subcategory panels 
- Content list
- Icon panels 

To set or change these settings:

1. Open the category for editing. Refer to [Edit a category](#) for more information.
2. Make your Subcategory Display Type selection.
3. Some Subcategory Display Types include additional settings, which will appear below the Subcategory Display Type. Make any necessary additional selections.
4. Be sure to **Save** your changes.

There are four Subcategory Display Type options:

- Title and description
- Subcategory panels
- Content list
- Icon panels

Title and description

This Subcategory Display Type displays category titles and description in a simple grid format with three categories to a row. [Example: Company and product info.](#)

We have a modified version with subcategories in our knowledge base (we force one subcategory per row): [Example: Security and permissions](#)

Home

General Top-Level category Subscribe

This is a sample Title + Description category with articles displayed below subcategories

General Subcategory Custom Content
Category test 20190912

Articles

Article in default cat
Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

Linked article test (child)
Meta description test.

Sample default category, Title and description subcategory display type

Subcategory panels

This Subcategory Display Type displays subcategory titles in panels matching the homepage base category panels with three categories to a row. We have modified versions of this in our knowledge base (we force one category per row).

Article Display limitation
When using subcategory panels, articles only show when using inline display for the Article Display options.

So, for example, here is the same category as above with subcategory panels selected, without the inline display selected:

Home

General Top-Level category Subscribe

This is a sample default category

General Subcategory Custom Content
Category test
20190912

Sample default category, Subcategory panels subcategory display type

And with the inline display selected, where articles are displayed in the same panels:

Home

General Top-Level category Subscribe

This is a sample default category

General Subcategory

Custom Content Category test 20190912

Article in default cat

Linked article test (child)

Sample default category, Subcategory panels + Inline article display

Content list

This Subcategory Display Type displays the title of each subcategory with a list of links to the first five subcategories or articles in the categories. The total number of subcategories and articles are displayed in parentheses with a link to view all. [Example: Account and billing.](#)

Home

General Top-Level category Subscribe

This is a sample default category

[General Subcategory \(1\)](#)

- [Test article in subcat](#)

Articles

[Article in default cat](#)

Lorem ipsum dolor sit amet, duo utamur copiosae torquatos ad, sale virtute vituperata ne cum, id quo aliquando adolescens argumentum. Eum nemore sadipscing eu, gloriatur deterruisset ei sea, denique definitiones mei ne. Mel ea erat aperiam, falli in...

[Linked article test \(child\)](#)

Meta description test.

Sample Default category, Content list subcategory display type

There is an option to show all child content rather than just the first five:

Content List Options

Show all child content

Default is to only show the first 5 subcategories and articles inside of subcategories with links to See More

Additional Content List Option to show all child content

Icon panels

This Subcategory Display Type displays all subcategories in panels with icons, in the same style as [Add category icons to your homepage category panels](#). These use the [category icons](#) you've set for each subcategory, and we have a few default icons that will be used if a category doesn't have an icon, too.



This option is not compatible with the Inline article display--you must select above or below subcategories display option.

The screenshot shows a website header with a navigation menu, a search bar, and links for 'Contact Us', 'Widget Help', and 'Logout'. Below the header, the page title is 'General Top Level Category' with a 'Subscribe' button. A subtitle reads 'This is a sample default category using icon panels'. Two subcategory panels are displayed: one with a camera icon labeled 'General Subcategory' and another with a target icon labeled 'Custom Content Category test 20190912'. Below these panels is an 'Articles' section with a link to 'Article in default cat' and a paragraph of placeholder text. A second link 'Linked article test (child)' is also present. A dark blue footer bar at the bottom of the screenshot contains the text 'Sample Default category, Icon panels subcategory display type'.

There are three additional Icon Panels Options:

- **Limit the maximum number of subcategories displayed.** This is useful if you have a lot of categories and only want to display the first few. (Default is no limit.)
- **Set how many subcategories you'd like per row.** When higher numbers are selected, the display is automatically responsive to device size, so 4 categories per row on a laptop may shift to 1 category per row on a cell phone. (Default is 4 categories per row):
- **Show category description.** If you'd like to display the category's description within the panel, check this box. (Default is no description.) We recommend using short category descriptions if you use this option.

Icon Panels Options

Limit maximum number of categories shown to

Display categories per row

Show category description

Additional Icon Panels Options to set max number of categories and categories per row

After you set up your category, KnowledgeOwl automatically displays the category's content in the chosen format.

Quick Add/default setting

All newly created Default categories (including Quick Add categories) will have these default settings:

- Icon panels subcategory display type
- No limit on the number of subcategories
- 4 categories per row
- No category description displayed
- Below subcategories article display
- Toggle option in the table of contents

Customize category behavior in the table of contents

When a reader clicks on a category in the table of contents, the default behavior is for the category menu to toggle open and closed to show and hide its content.

If you want clicking the category to navigate to the category landing page:

1. Open the category settings. Refer to [Edit a category](#) for more information.
2. Select **Navigate** under the **Table of Contents Options** on the category's settings page:

Table of Contents Options

- Toggle — Expand or collapse contents when clicked
- Navigate** — Go to category page when clicked
- Hide contents

3. **Optional:** by default, when using the **Navigate** setting, KnowledgeOwl both navigates to the category page on click, and toggles open the category menu. To hide the sub-menu and remove the toggle behavior, select **Hide contents**.

Delete a category and its content

Delete a category, and its content

You can delete a category in two places:

- From the **Articles** page, using the trashcan icon.
- From the **Category Editor** when you're viewing that category, by selecting **Deleted** from the **Status** dropdown.

Below, we walk through each method in more detail.



Category deletes also delete content

When you delete a category, you also delete all the content inside the category. If you want to delete a category but not the content inside it, move the content out of the category before deleting. If you delete a category by accident or need to recover a deleted category, [contact us](#) so we can recover the category and all of its articles and subcategories.

Delete category from the Articles page

To delete a category from the Articles page:

1. Select **Articles** from the left navigation.
2. Find the category you want to delete. If it's a subcategory, you'll need to open the category it's located within.
3. Hover over the category you want to delete.
4. Select the **Trashcan / Delete** icon.

Select the trashcan/Delete icon.

5. The **Delete Category** modal opens. Be sure the category name displayed here matches the category you want to delete!
6. If it does, type the word **delete** into the textbox and select **Delete Category**.

Type delete and select Delete Category.

7. The category and all of its subcategories and articles will be set to **Deleted**.

Delete category from the Category Editor

To delete a category from the Category Editor:

1. Open the category you'd like to delete as if you're going to edit it.
2. In the **Status** dropdown, select **Deleted**.

Select Deleted from the Status dropdown.

3. This will open a confirmation pop-up which will warn you that once you save the category with this status, all content within the category will also be deleted. If you want to proceed with deleting, type the word **delete** into the textbox and select **Confirm**.

Type delete and select Delete Category.

4. Save your category to finalize the status change and deletion.
 5. Your category and all of its subcategories and articles will be set to Deleted.
-